



# OLO USER GUIDE

Moe's Southwest Grill 2017





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# SETTING UP ACCOUNT

## 1.) ESTABLISH CREDIT CARD PROCESSING FOR ONLINE ORDERING WITH FIRST DATA

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- a. Your Focus Brands IT partners have worked with First Data/Payeezy to setup new TIDs for **OLO**, for all locations currently using Monkey Media. You may receive an email notifying you of the TID setup; there is no action needed from you.
- b. If you currently are not using First Data for Monkey Media, you will need to sign up for a First Data e-commerce account. You should have received an email from First Data to sign up. If not, you need to call First Data at 800-617-6240 and let them know you need an e-commerce account for **OLO**.

## 2.) COMPLETE THE OLO ACTIVATION FORM

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- a. Click on this link to complete an activation form for each location: [https://oloskiptheline.formstack.com/forms/moe\\_s\\_southwest\\_grill\\_olo\\_online\\_ordering\\_enrollment\\_form](https://oloskiptheline.formstack.com/forms/moe_s_southwest_grill_olo_online_ordering_enrollment_form)
- b. NOTE: Owners with 15+ locations will receive a separate communication and form to complete from their FBC.

## 3.) WHITELIST THE OLO IP ADRESSES WITH YOUR FIREWALL PROVIDER

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1. Contact your firewall provider and have the **OLO** IP addresses whitelisted  
- [OLO Whitelist](#)
2. Navigate to TEST: <https://api.olo.com/healthcheck.htm>

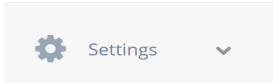


# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## SET DAILY SALES REPORT EMAIL

If activated, **OIO** will send an email with a brief summary of how the store performed the previous day. This will give you an overview of your store(s) performance.

\*This needs to be activated at a brand level before the field appears on your Dashboard. If you are not seeing the proper fields, please contact your Corporate Team.

1. Login to the **OIO** Dashboard at <https://my.Olo.com>
2. Click on the “Settings” tab on the left side of the screen.  

3. Click on “Store Settings”.
4. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
5. Click on “Store Information”.
6. About halfway down the page you will see a setting for “Email Daily Sales Report”. Switch that to “Yes”.

Email Daily Sales Report



7. Once enabled, a new field will appear for “Daily Sales Report Email Address” where you will enter in the email address(es) to receive the email notification. Put a semicolon “;” between email addresses if adding multiple.

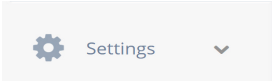
Daily Sales Report Email Address

WelcomeU@moes.com



# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## UPDATE TAX RATE

1. Login to the **OIO** Dashboard at <https://my.Olo.com>
2. Click on the “Settings” tab on the left side of the screen.  
A screenshot of a user interface showing a 'Settings' tab with a gear icon and a dropdown arrow.
3. Click on “Store Settings”.
4. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
5. Click on “Store Information”.
6. About halfway down the page you will see “TAX RATE” fill in your tax percentage.

Tax Rate

8.9000

%

required

7. Once finished filling out the store information click on “Save Store Settings.”

✓ Save Store Settings

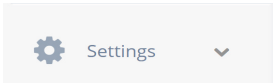


















# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## EDIT RESTAURANT HOURS OF OPERATION

You can change the hours your store will be open by following the steps below:

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Settings” tab on the left side of the screen.  

3. Click on “Store Hours”.
4. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on ‘Confirm Store Selection’. If you want to make a bulk hour update across multiple stores, you can select multiple stores.
5. Click on Edit for each day to change the hours, then click save to save any changes. If you have a drive through; you will have another tab for drive through hours.

### Business Hours

| FROM: |            | TO:   |           |   |
|-------|------------|-------|-----------|---|
| Sun ▾ | 11:00 am ▾ | Sun ▾ | 8:00 pm ▾ |   |
| Mon   | 11:00 am   | Mon   | 8:00 pm   |   |
| Tue   | 11:00 am   | Tue   | 9:00 pm   |   |
| Wed   | 11:00 am   | Wed   | 9:00 pm   |   |
| Thu   | 11:00 am   | Thu   | 9:00 pm   |   |
| Fri   | 11:00 am   | Fri   | 9:00 pm   |   |
| Sat   | 11:00 am   | Sat   | 9:00 pm   |   |

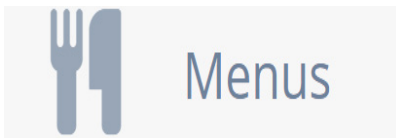


# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

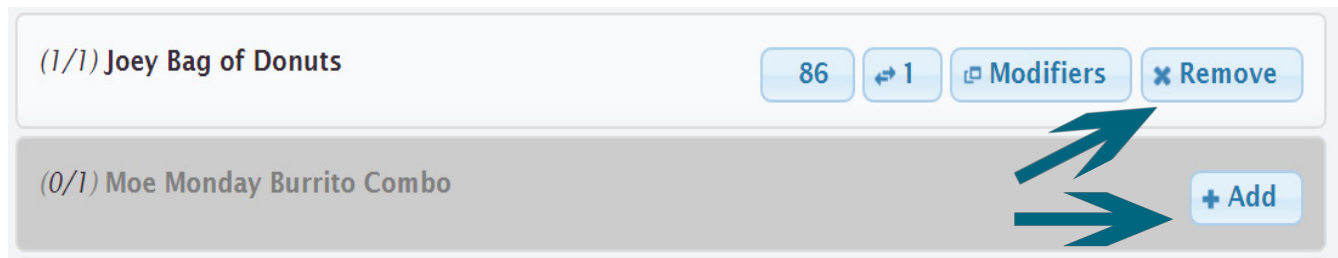
## ADD OR REMOVE A PRODUCT FROM THE RESTAURANT MENU

You can use the **OIO** Dashboard to update your online menu; including (or not) any product from the company menu, based on what is offered at your store(s).

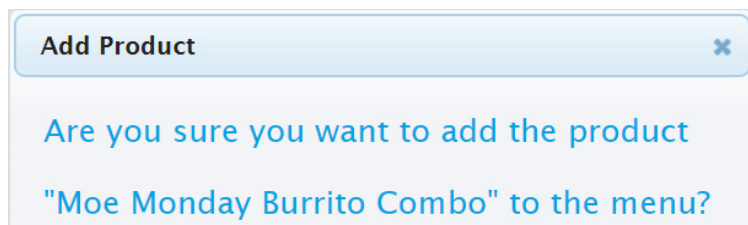
1. Login to the **OIO** Dashboard at <https://my.Olo.com>
2. Click on the “Menus” tab on the left side of the screen.



3. Select the store(s) for whose menu you'd like to update and click “Next” (These are all the store(s) you have access to).
4. Click a category to expand the list of products (e.g. Appetizers, Burgers).
5. Click “+ Add” or “Remove” for the product you wish to add or remove.



6. A pop up window titled “Add Product” or “Remove Product” will appear; confirm your selection. Once you approve, this will change the store’s menu and the clients’ favorites, so make sure you review it carefully before you go to the next step.



7. Exit by click the “X” on the upper right side of the pop up window.



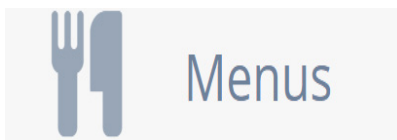


# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

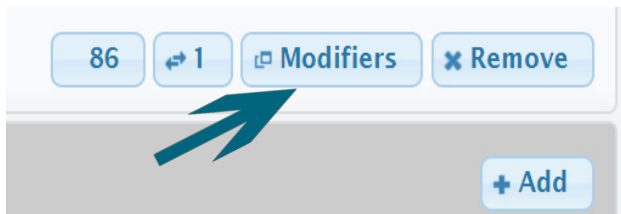
## ADD OR REMOVE A MODIFIER FROM MENU ITEMS

You can use the **OLO** Dashboard to update your online menu to include (or not), any option group or choice from the company menu based on what is offered at your store.

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Menus” tab on the left side of the screen.



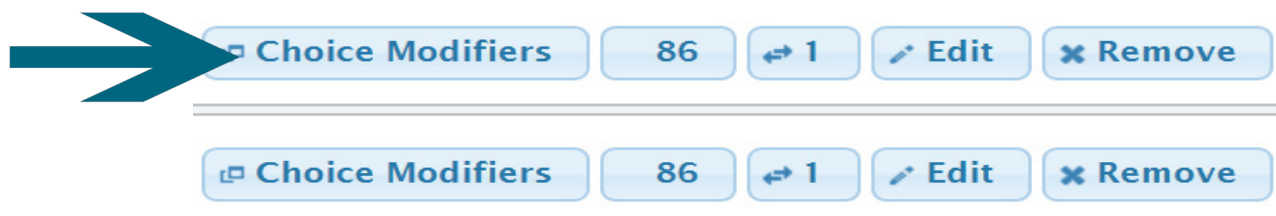
3. Click “Manage Store Menu”.
4. Select the store(s) you want to update.
3. Click a category to expand the list of products (e.g. Hamburger).
4. Click the “Modifiers” button next to the product with the Modifier Groups you would like to update.



5. Click “Choices” on the modifier group that contains the modifier you would like to add or remove from your menu.



6. Click “Choice Modifiers” on the modifier group that contains the modifier you would like to add or remove from your menu.

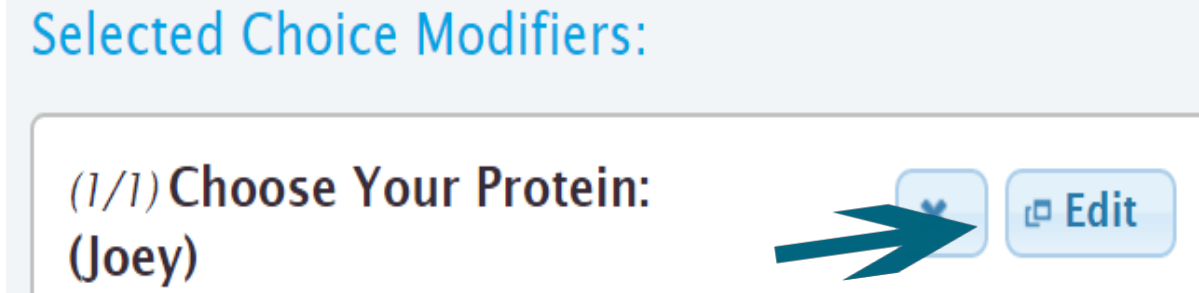




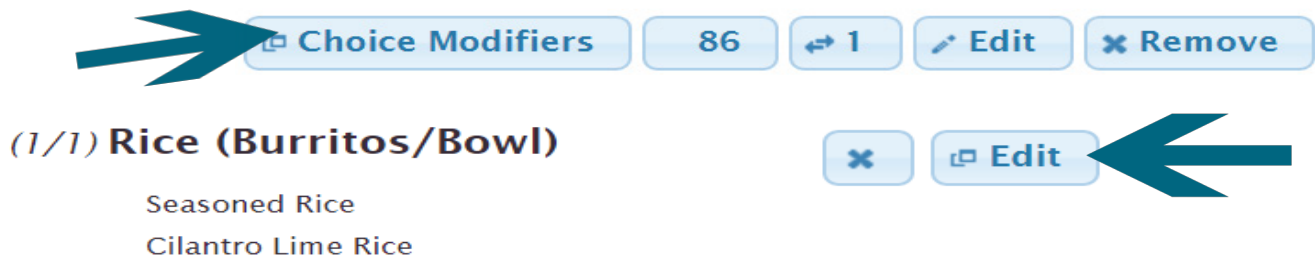
# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## ADD OR REMOVE A MODIFIER FROM MENU ITEMS

7. Click “Edit” on the modifier group.



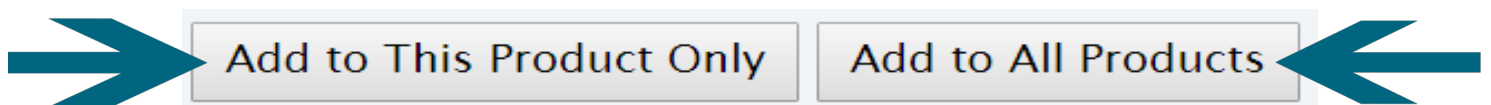
8. Click on “Choice Modifiers” on the modifier group that contains the modifier you would like to add or remove from your menu. Then select the modifier group you wish to update by clicking “Edit.”



9. Click “Add” or “Remove” next to the Modifier you wish to update. If the modifier group is being used across multiple products, you’ll be asked if you would like to add or remove the modifier from all products or just the product you are currently updating.



10. Select “Add to this Product only” or “Add to All Products”. Then click the “X” to exit.





# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## ADD OR REMOVE A MODIFIER FROM MENU ITEMS

### Apply Change to All Products

The **OLO** Menu platform allows you to easily share Modifiers to make it easy to perform updates across products. If you wish to add/remove the modifier on all products that share this Modifier, click “Add to All Products” or “Remove from All Products” on the pop up that appears when you click to add or remove the modifier.

To see a list of all the products this update would affect, click “Show Product List”. However, you have the flexibility to add/remove the modifier for only the product you select. To limit the change to only this product you have selected to modify, click “Add to this Product Only” or “Remove from This Product Only”.

Show Product List

Remove from This Product Only

Remove from All Products

### Disabling Past Orders and Saved Favorites?

Customers can re-order using past order records and saved Favorites. If you remove a product or modifier group or modifier from the menu, it may disable customer favorites. The customers will see a notification that they must Click to Fix the Favorite.

Disabling Favorites is OK if you are changing the menu, but it is a good thing to be aware of when making changes.

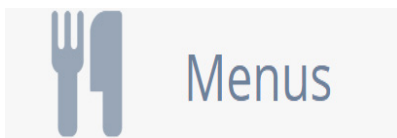


# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

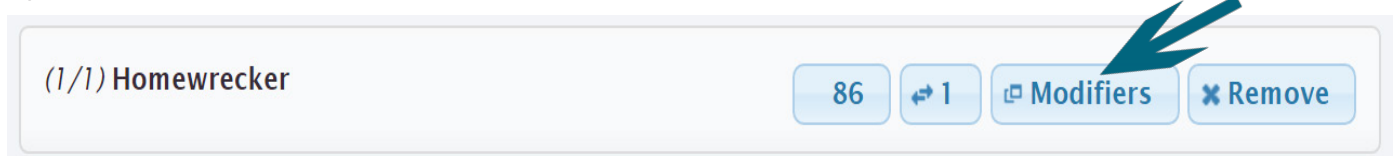
## UPDATE PRICING

You can use the **OIO** Dashboard to Update Menu Prices. **Aloha USERS ONLY NEED TO UPDATE MOE MONDAY PRICING & LTO'S.** Non Aloha users need to update all pricing.

1. Login to the **OIO** Dashboard at <https://my.Olo.com>
2. Click on the “Menus” tab on the left side of the screen.



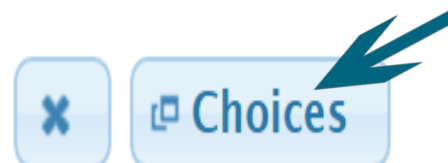
3. Click “Manage Store Menu”.
4. Select the store(s) you want to update.
3. Click a category to expand the list of products (e.g. Hamburger).
4. Click the “Modifiers” button next to the product with the Modifier Groups you would like to update..



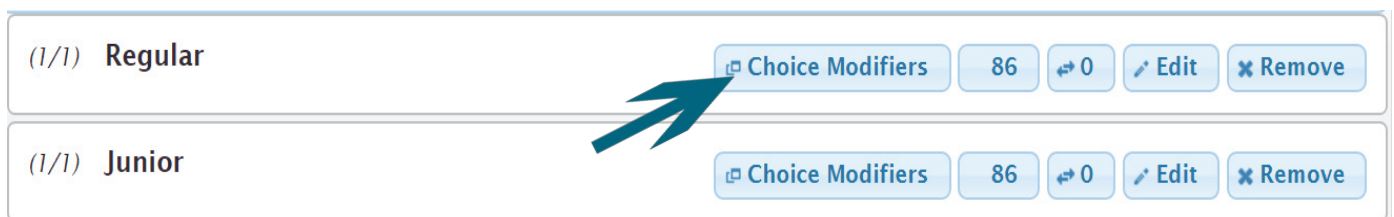
5. Click on “Choices”.

(1/1) Item (Homewrecker)

Regular



6. Click on “Choice Modifiers” for Regular or Junior.





# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## UPDATE PRICING

7. Click on “Edit.”

### (1/1) Choose Your Protein: (Homewrecker)

Pork Carnitas  
Steak  
Chicken  
Spicy Chicken



8. Click on “Edit” for each modifier to update pricing.

|                                      |                  |    |   |      |        |
|--------------------------------------|------------------|----|---|------|--------|
| (1/1) <b>Pork Carnitas</b> (+\$5.99) | Choice Modifiers | 86 | 0 | Edit | Remove |
| (1/1) <b>Steak</b> (+\$5.99)         | Choice Modifiers | 86 | 0 | Edit | Remove |
| (1/1) <b>Chicken</b> (+\$5.99)       | Choice Modifiers | 86 | 0 | Edit | Remove |

9. Enter in the price and then click “Save”. (**Do this for every protein choice**)

|                              |         |  |        |      |
|------------------------------|---------|--|--------|------|
| (1/1) <b>Steak</b>           | \$ 5.99 | Taxable: <input checked="" type="checkbox"/> | Cancel | Save |
| Choice Modifiers 86 0 Remove |         |  |        |      |

10. Click “X” to exit.





# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## TURN THE MENU ON OR OFF FOR ONLINE ORDERS

1. Login to the **OIO** Dashboard at <https://my.Olo.com>
2. Click on the “Settings” tab on the left side of the screen and then click on “Enable/Disable Store”.

Store Hours

Enable/Disable Store

Payments

POS Settings



3. Once you click the “Enable/Disable Store” Link, you may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”. (You can only do this one store at the time).

4. If your store is currently disabled, you will see “Disabled” next to your store name. The system will give you the ability to enable your store at this point. Type in the Internal Reason for enabling your store. This will not be viewable by customers, but keeps a log so that you can keep track of who is enabling/disabling

Sandy Springs: Enabled



### Disable Store

Internal Reason

Reason (required)

Public Message

Default

Online ordering is unavailable at this time. Please use the location finder to try another location nearby.

Disable





# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## TEST ORDERS FOR YOUR LOCATION

1. Go to online menu and complete a transaction using credit card.

<https://moes.olo.com/menu/XXXX>

- XXXX = Store Number

### Sandy Springs

6190 Roswell Rd NE, Sandy Springs, GA 30328  
Change Location

Pickup Hours:  
Accepted Cards:

Open today 11am-8pm  
Mastercard, Visa, American Express, Discover

- BURRITOS
- BOWLS
- TACOS
- QUESADILLAS
- NACHOS
- SALADS
- STACKS
- KIDS
- DRINKS
- EXTRAS
- DESSERTS
- VIEW ALL



### BURRITOS

#### HOMEWRECKER

Served in a flour or whole grain tortilla with seasoned rice, beans, shredded cheese, pico de gallo, and homemade guacamole. Protein options include all-natural steak, chicken, pork carnitas, ground beef or organic tofu.

#### JOEY BAG OF DONUTS

Served in a flour or whole grain tortilla with seasoned rice, beans, shredded cheese and pico de gallo. Protein options include all-natural steak, chicken, pork carnitas, ground beef or organic tofu.

Favorites **Group Order**

Login to use this feature.

**ORDER CONTENTS**

|           |        |
|-----------|--------|
| SUB TOTAL | \$0.00 |
| TAX       | \$0.00 |
| TOTAL     | \$0.00 |

### How would you like to Checkout?

**Log into account** (existing users) **Create an account** (easy next time) **Checkout as guest** (no signup required)

First Name:

Last Name:

Email Address:  (Why?)

Contact Phone Number:  (Why?)

**Payment Method**

☒ Enter Credit Card

Accepted Credit Cards:

Card Number:

Expiration Date:  09  2017

Security Code:

Zip/Postal Code:

Country:  United States

**LOG IN TO MOES**

Review address & order details for accuracy.  
Your order will be sent to Sandy Springs. Submitting this order confirms that you accept all associated terms and conditions.

**Place Order**

2. Verify pricing on menu is accurate.

|  |  |  |
|--|--|--|
| <input type="radio"/> <b>Pork Carnitas</b><br>(+ \$8.39) | <input type="radio"/> <b>Steak</b><br>(+ \$8.39)       | <input type="radio"/> <b>Chicken</b><br>(+ \$7.69) |
| <input type="radio"/> <b>Spicy Chicken</b><br>(+ \$7.69) | <input type="radio"/> <b>Ground Beef</b><br>(+ \$7.69) | <input type="radio"/> <b>Tofu</b><br>(+ \$7.69)    |
| <input type="radio"/> <b>Fish</b><br>(+ \$7.48)          | <input type="radio"/> <b>Veggie</b><br>(+ \$6.69)      |  |

3. Verify receipt prints at POS and Chit at Kitchen Printer.



POS

9/26/2017 2:54 PM 1 of 1

Interface  
Joey Donuts  
Check: 610003

**ONLINE ORDER**

|              |            |
|--------------|------------|
| Online Order | 0.00       |
| 88043890     | 0.00       |
| NOT PAID     | 0.00       |
| ASAP         | 0.00       |
| Pickup time  | 0.00       |
| 3:12 PM      | 0.00       |
| Phone Number | 1555555555 |
|              | 0.00       |

-----

\* Chris

-----

Hi - Message

\* Chris

Flour Tortilla

Black Beans

Seasoned Rice

Shred Cheese

Pico de Gallo

Guacamole

-----

\* Greg

-----

\* Greg

-----

Joey- Joey Chn

\* Greg

Flour Tortilla

Seasoned Rice

Black Beans

Shred Cheese



Kitchen Printer

Welcome to Moes's  
Glenridge #123  
880 Johnson Ferry Rd  
404-303-0881

Host: Interface 09/26/2017 2:54 PM 610003

Joey Donuts

|                            |            |
|----------------------------|------------|
| Online Order               | 0.00       |
| 88043890                   | 0.00       |
| NOT PAID                   | 0.00       |
| ASAP                       | 0.00       |
| Pickup time                | 0.00       |
| 3:12 PM                    | 0.00       |
| Phone Number               | 1555555555 |
|                            | 0.00       |
| Restaurant Space (4 MO.00) | 0.00       |
| Homeowner's Vopile         | 6.69       |
| 07- Tortilla               |            |
| 07- Black Beans            |            |
| 07- Rice                   |            |
| 07- Cheese                 |            |
| 07- Pico de Gallo          |            |
| 07- Guacamole 1oz          |            |
| Joey Bag of Donuts Sck     | 6.48       |
| 07- Tortilla               |            |
| 07- Rice                   |            |
| 07- Black Beans            |            |
| 07- Cheese                 |            |
| 07- Pico de Gallo          |            |

Subtotal 13.17

Tax 1.02

**ONLINE ORDER Total 14.19**

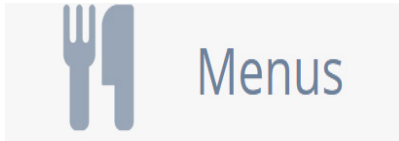
4. Refund the order and credit card using the **OLO** Dashboard. **Page 16 & 17 on the User Guide.**



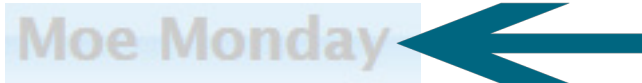
# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## ADD MOE MONDAY PRICING

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Menus” tab on the left side of the screen.



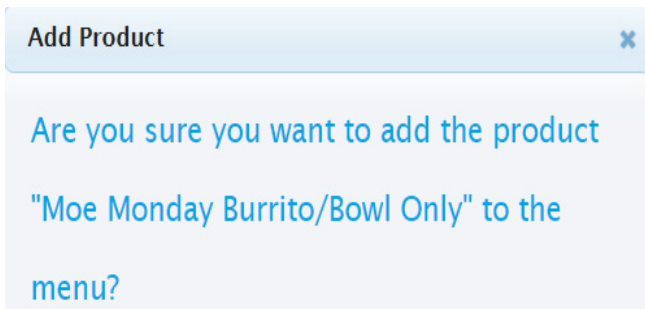
3. Select the store(s) for whose menu you'd like to update and click “Next” (These are all the store(s) you have access to).
4. Click Moe Monday.



5. Click “Add” for the Moe Monday Promotion your restaurant participates in.



6. A pop up window titled “Add Product” will appear, confirm your selection.



7. Click the promotion title to add pricing.







# CONFIGURE OLO APPLICATION FOR YOUR LOCATION

## ADD MOE MONDAY PRICING

8. A pop up window will appear titled “Product Details,” Click on “edit” next to “Base Cost.”

Product Details

Product Details Availability Settings Menu Item Labels

Moe Monday Burrito/Bowl Only

Every Monday is Moe Monday! Start your week off right with a burrito or bowl, chips and salsa.

Base Cost: [Edit](#) \$0.00

Taxable: [Edit](#) Yes

Handoff Modes: [Edit](#) CounterPickup, CurbsidePickup, Delivery, DriveThru, Dispatch

9. Enter the promotion price and click “save” . Click “X” to exit.

Base Cost: 5.99 [Save](#) [Cancel](#)

10. Log into Aloha Configuration Center.



11. Then go to Maintenance>Pricing>Price changes.

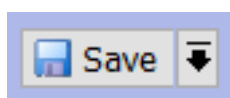
12. Go to number “336” “OLO Moe Monday.”

| Number | Name           |
|--------|----------------|
| 336    | OLO Moe Monday |

13. Change the price to your current moe monday prmotion price.

| Component Item | Compare | Change |
|----------------|---------|--------|
| Regular Price  |         | \$5.99 |

14. Click “Save” and exit.





# MANAGING THE OLO DASHBOARD

## ISSUING A REFUND

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Orders” tab on the left side of the screen.



Orders

3. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
4. Enter the Olo Order Id into the Specific Order Field or search your order by clicking on “Search by Time Frame” or “Search by Transaction”.

Lookup by Order ID

Search by Time Frame

Search by Transaction

Specific order #:

85636217

See Order Details

5. Once your order appears, click on the Order ID to see the order details.

| Order ID                 | Type   | Time Placed            | Time Wanted            | Vendor  |
|--------------------------|--------|------------------------|------------------------|---------|
| <a href="#">85636217</a> | Pickup | 9/4/2017<br>5:36:04 PM | Immediate<br>(6:00 PM) | Roswell |

6. Click “Refund Order” at the top right of the Order Details page.



Print

Refund Order

Other Actions ▼



# MANAGING THE OLO DASHBOARD

## ISSUING A REFUND

7. Enter your name, select a reason for the refund, and enter any details for the customer. Click “Review Refund Order Request”.

### Refund Order Request

|   |  |
|---|--|
| Order Id:   | 85636217   |
| Customer Name:  | Lisa Philpott  |
| Your Name:  | <input type="text" value="Moes Burrito"/>  |
| Select Reason:  | <input type="text" value="Unsatisfied customer"/>  |
| Details for customer:   | <div><p>We have processed your refund.</p><p><b>Note: These details will be visible to the customer.</b></p></div> <div></div> |
| <div><input type="button" value="Review Refund Order Request"/></div> |  |

8. Double check your details before the next step. This will submit the refund to the payment processors for settlement. You will not be able to reverse this action.
9. Click “Process Refund Request”.



### Important Information:

**\*NOTE\*** This process will refund the customer, but these changes will not reflect in your POS. Please follow the appropriate procedure for your POS to adjust or update the original order total.

This will submit the refund to the payment processors for settlement. You will not be able to reverse this action.

- For any refund or adjustment you process, the customer will automatically receive a confirmation email to the email address on file.
- The adjustment transaction will process immediately and should show up on the customer's credit card statement within 1 to 3 business days.

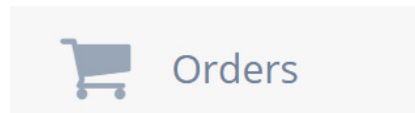


# MANAGING THE OLO DASHBOARD

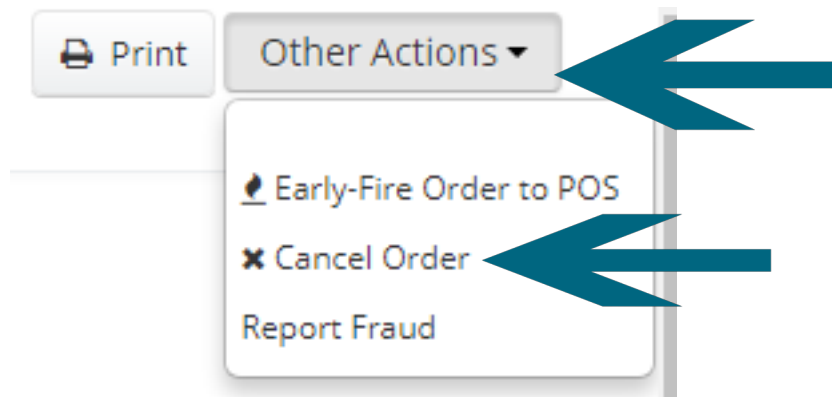
## CANCEL AN ORDER

For instructions on how to cancel an order please follow the following steps:

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Orders” tab on the left side of the screen. Here you will be able to choose the Scheduled order you want to cancel.



3. Click on the order number and then click on “Other Actions” then click on “Cancel Order.”



4. Select “Yes, Cancel Order” from the pop up box.

### Cancel Order (86639621)

**Are you sure you wish to cancel this order?**

Once it has been canceled the order total will be refunded to the customer credit card and the customer will be notified by email.

It's important to remember that you can ONLY cancel an order while its status is Scheduled. If the order moves to the next status you won't be able to cancel it, however you will be able to generate a partial, or a full order refund once the order is closed.



# MANAGING THE OLO DASHBOARD

## REPORT FRAUD

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Orders” tab on the left side of the screen.



Orders

3. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
4. Enter the Olo Order Id into the Specific Order Field or search your order by clicking on “Search by Time Frame” or “Search by Transaction”.

Lookup by Order ID

Search by Time Frame

Search by Transaction

Specific order #:

85636217

See Order Details

5. Once your order appears, click on the Order ID to see the order details.

| Order ID                 | Type   | Time Placed            | Time Wanted            | Vendor  |
|--------------------------|--------|------------------------|------------------------|---------|
| <a href="#">85636217</a> | Pickup | 9/4/2017<br>5:36:04 PM | Immediate<br>(6:00 PM) | Roswell |

6. Click “Other Actions” at the top right of the Order Details page.



Print

Refund Order

Other Actions ▾



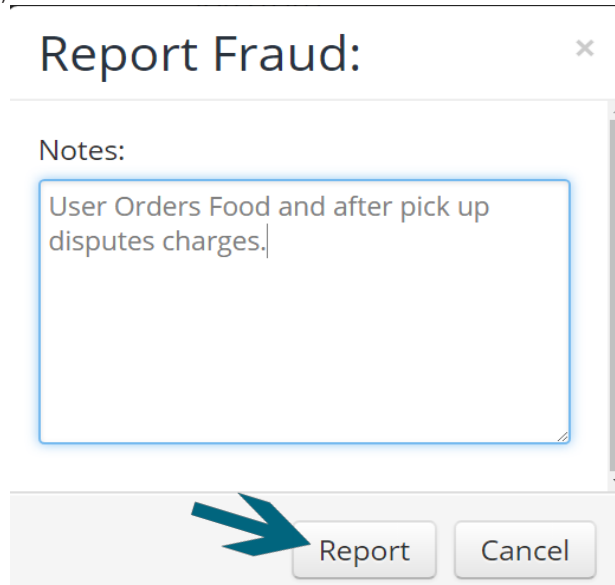
# MANAGING THE OLO DASHBOARD

## REPORT FRAUD

7. Click “Report Fraud”.

Report Fraud 

8. A pop up window will appear, with a notes section. Add a note describing the Fraud incident. Then click “Report.”



The image shows a 'Report Fraud' pop-up window. It has a title bar with a close button (X). Below the title is a 'Notes:' section with a text area containing the text 'User Orders Food and after pick up disputes charges.' At the bottom of the window are two buttons: 'Report' and 'Cancel'. A blue arrow points to the 'Report' button.

9. Now that this order has been marked as fraudulent, the customer’s User Name for the account and the Device ID will be blocked.

Order details

Order 88872940

**Fraud has been reported**

 Print

Refund Order

Other Actions ▼

## Important Information:

This means that **OLO** blocked that user’s User ID and their device ID so that they won’t be able to order from his/her device (e.g. phone, laptop) moving forward. If a customer is blocked by **OLO** or is blocked manually and tries to checkout with an order, **OLO** will slow down the process by loading the page for 10 seconds and then throw an error message saying “Sorry, we cannot send the order at this time. Please call the store to place the order.”



# MANAGING THE OLO DASHBOARD

## SALES & ORDER REPORTS

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Reports” tab on the left side of the screen and then click on “Sales & Orders”.
3. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
4. Select the Report Type and Data Range for the report you would like to generate. There are several pre-configured sales reports available. Please review the following definitions to clarify how each report can be used to help you track the success of your Olo online and mobile ordering program.

### REPORT

### DESCRIPTION

|  |  |
|--|--|
| Daily Breakdown- Billed Orders             | Orders placed and billed for a restaurant or group of restaurants by day                                     |
| Daily CC Breakdown- Billed Orders          | Orders placed and billed for a restaurant or group of restaurants by day, broken out by credit card type     |
| Daily CC Breakdown by Store- Billed Orders | Orders placed and billed by day, broken out by restaurant and credit card type                               |
| Daily Breakdown- Closed Orders             | Orders picked up or delivered (“closed”) broken out by restaurant  |
| Store Breakdown- Closed Orders             | Orders picked up or delivered (“closed”), broken out by restaurant   |
| Product Breakdown                          | Products broken out by restaurant based on day of pickup or delivery   |
| Itemized Adjustments                       | List of adjustments, including both full refunds and sub-total adjustments                                   |
| Itemized Cancelled Orders                  | List of canceled orders  |
| Time of Day Breakdown                      | Breakdown of when orders are picked up or delivered, in one hour increments, by restaurant                   |
| Advanced Orders Distribution               | Breakdown of when orders are placed for, either ASAP or Advance, including how far in Advance, by restaurant |



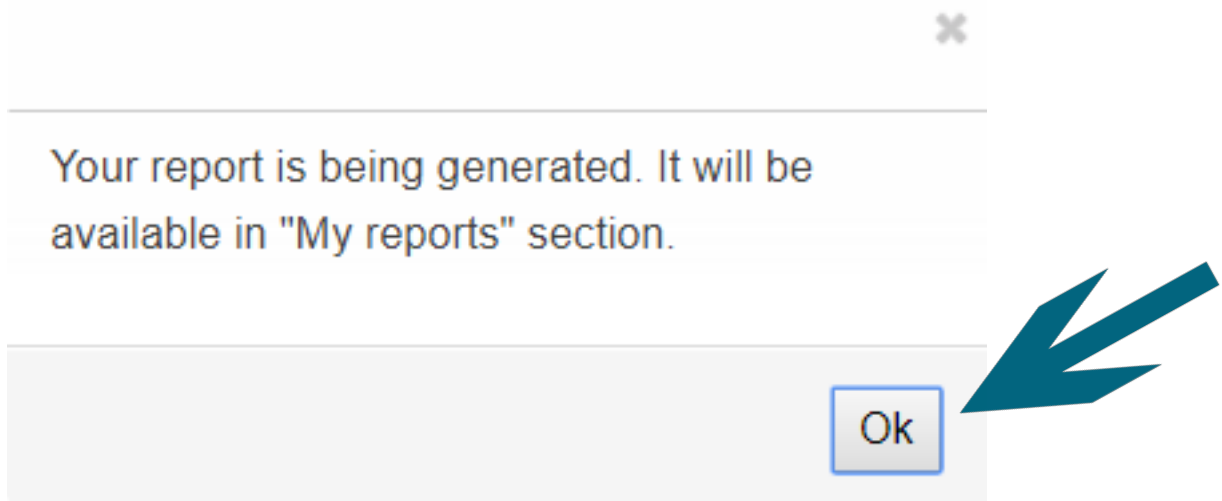
# MANAGING THE OLO DASHBOARD

## SALES & ORDER REPORTS

5. Click "Generate Report".

**Generate Report**

6. A pop up window will appear, click "OK" and then go to "My Reports" to visualize your new report



7. Select the report you wish to view and click on "Download Report" to view.

**Download Report**







# MANAGING THE OLO DASHBOARD

## REPRINT AN ORDER FROM THE DASHBOARD

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Orders” tab on the left side of the screen.



Orders

3. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
4. Enter the **OLO** Order Id into the Specific Order Field or search your order by clicking on “Search by Time Frame” or “Search by Transaction”.

Lookup by Order ID

Search by Time Frame

Search by Transaction

Specific order #:

85636217

See Order Details

5. Once your order appears, click on the Order ID to see the order details.

| Order ID                 | Type   | Time Placed            | Time Wanted            | Vendor  |
|--------------------------|--------|------------------------|------------------------|---------|
| <a href="#">85636217</a> | Pickup | 9/4/2017<br>5:36:04 PM | Immediate<br>(6:00 PM) | Roswell |

6. Click “Print” at the top right of the Order Details page.



Print

Refund Order

Other Actions ▼



# MANAGING THE OLO DASHBOARD

## CASH RECONCILIATION

1. Login to the **OLO** Dashboard at <https://my.Olo.com>
2. Click on the “Reports” tab on the left side of the screen and then click on “Sales & Orders”.
3. You may be prompted to select a store if you have access to more than one location through your Dashboard. If so, choose the store from the right hand section and click on “Confirm Store Selection”.
4. Select the “Daily Breakdown-Billed Orders” report. Click “Generate Report”. Then go to My Reports and download the report.
5. Use this report to reconcile with the WSR in Menu Link.

### 3532 GA-Sandy Springs Sales Report (WSR)



|                              | Thursday   | Friday     | Saturday   |
|------------------------------|------------|------------|------------|
| <b>Cash Reconciliation</b>   |            |            |            |
| Gross Sales                  | \$3,403.51 | \$2,356.52 | \$1,279.62 |
| -Discounts/Promos            | \$397.35   | \$117.27   | \$98.17    |
| -Donations                   | \$0.00     | \$0.00     | \$0.00     |
| = Net Sales                  | \$3,006.16 | \$2,239.25 | \$1,181.45 |
| + Sales Tax                  | \$219.12   | \$173.55   | \$91.51    |
| Total Sales                  | \$3,225.28 | \$2,412.80 | \$1,272.96 |
| - Paid Outs                  | \$134.50   | \$15.00    | \$0.00     |
| +Paid Ins                    | \$0.00     | \$0.00     | \$0.00     |
| + Gift Cards Sold            | \$50.00    | \$0.00     | \$0.00     |
| Payment on Account           | \$0.00     | \$0.00     | \$0.00     |
| Sales on Account             | \$0.00     | \$0.00     | \$0.00     |
| Accountable Total            | \$3,140.78 | \$2,397.80 | \$1,272.96 |
| - Gift Card Redeemed         | \$0.00     | \$1.56     | \$10.00    |
| - Alt Tender (Student Card)  | \$0.00     | \$0.00     | \$0.00     |
| - Alt Tender (Online/Mobile) | \$9.44     | \$69.29    | \$9.57     |



# ONLINE ORDERING PROCEDURE

## PRINTER & TICKET

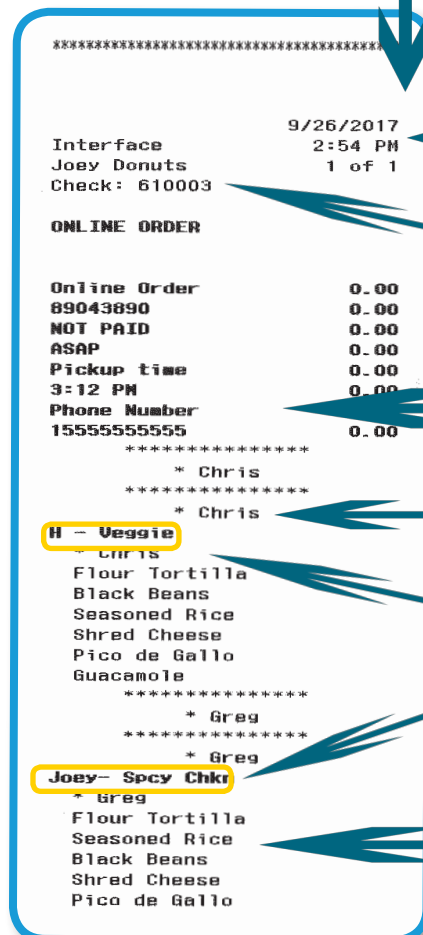
### OLO Printer



The **OLO** printer is a standard Epson printer that included a button that makes a sound when an order is recieved.

**Note:** You cannot reprint from the **OLO** printer/ If it goes down, jams or runs out of paper the receipt will print out on the POS printer.

### OLO Ticket



Today's Date & Time  
Order was printed

Name of person placing the  
order followed by check number

Pick Up Time &  
Guest Phone Number

Guest Name for H - Veggie

Menu Abbreviation Followed by  
Protein or Veggie Option

**Note:** Protein or Veggie is Now  
Beside the Menu Name

Ingredients in Order



# ONLINE ORDERING PROCEDURE

## Operational Steps

- Step 1: Remove ticket from printer, and immediately check the pick up time to determine if it needs to be made now or at a later time. Tear the ticket for orders with more than 2 entrees and label 1 of 2, 2 of 2 as shown below.

The diagram shows a printed online order ticket with the following text:

```
Online Order      0.00
89043890         0.00
NOT PAID         0.00
ASAP             0.00
Pickup time      0.00
3:12 PM         0.00
Phone Number     0.00
1555555555      0.00
*****
* Chris
*****
* Chris
H - Veggie
* Chris
Flour Tortilla
Black Beans
Seasoned Rice
Shred Cheese
Pico de Gallo
Guacamole
*****
* Greg
*****
* Greg
Joey- Spcy Chkn
* Greg
Flour Tortilla
Seasoned Rice
Black Beans
Shred Cheese
Pico de Gallo
```

Annotations on the ticket:

- A blue arrow points from the text "Pick Up Time" to the "Pickup time" line.
- A blue arrow points from the text "Guest 1" to the red "1-2" label next to the "H - Veggie" section.
- A blue arrow points from the text "Guest 2" to the red "2-2" label next to the "Joey- Spcy Chkn" section.

- Step 2: Mark the foil with the abbreviation of the entree with the protein circled. Followed by the coinciding number on the kitchen ticket.

The diagram shows two pieces of foil with markings for Guest 1 and Guest 2:

- Guest 1: A blue arrow points to a piece of foil with the marking "H (V) 1".
- Guest 2: A blue arrow points to a piece of foil with the marking "J (SC) 2".

- Step 3: Send the tickets down the line to be made in between the in-store guests. (One OLO Ticket; One Guest) Ensure to read the ticket thoroughly. (Don't forget the protein is now listed beside the menu name)



# ONLINE ORDERING PROCEDURE

## Operational Steps

- Step 4: Swing position should label the bags with the coinciding number on the ticket and seal them with an “All Good” sticker : 1 and 2 as shown below.



- Step 4: Ring position will put all items that are grouped together in the same bags. Place the POS ticket with the order using an “All Good” Sticker (**Label the POS Ticket 1, 2**)



- Step 5: Place orders in designated **OLO** Pick up area.
- Step 6: Be on the lookout for guest waiting near the “Pick Up” sign.



- Step 7: Approach the guest with a smile and ask if they are waiting to pick up an order.
- Step 8: Confirm the order details with the guest.

“Hi Welcome to Moes, are you waiting to pick up an order?”

“May I have your name or Order number?”

“Have a great day and don’t forget to check out our free salsa bar!”





# ONLINE ORDERING PROCEDURE

## Need Technical Support

Please call Pomeroy at **1-877-425-7811** or email at [moes.servicedesk@pomeroy.com](mailto:moes.servicedesk@pomeroy.com)

If issues are not being resolved, franchisees can call **1-844-577-7423** and select Option 5 for Moe's support